

## **Records Management Program Activities:**

### **IDENTIFY RECORDS AND RECORDS SOURCES**

Distinguish records from non-records and uniquely identify the records found. Determine how, how many, and by whom records are being created or received and identify their relationship to the agency's business operations or functions.

### **DEVELOP FILE PLAN**

Specify how records are to be organized once they have been created or received. Identify the classes of records (record series) that an organization produces, and establish how to associate given records within a class to other records in that same class. For example, put all the travel vouchers in a file marked "travel vouchers" or, alternatively, put all travel vouchers for person X in a file marked "person X travel."

### **IMPLEMENT RECORD RETENTION SCHEDULES**

Determine where and how long records need to be retained and what their final disposition will be. All Federal records must be assigned a final disposition, which must be approved by NARA (44 USC 3303). [Records schedules](#) call for the disposition of records based on time, or event, or a combination of time and event. Records are either scheduled for destruction or for transfer to the National Archives for permanent preservation. Determining how long records need to be retained - and under what conditions - can dramatically reduce agency expenditures.

### **TRAINING & RECORDS AWARENESS**

Ensure all personnel with Records Management responsibilities receive appropriate training & that ALL EMPLOYEES are made aware of their recordkeeping responsibilities.

[What are YOUR Records Management Responsibilities? \(pamphlet\)](#)

[Records Management Basics \(Fact Sheet\)](#)

[File Plan Creation \(Fact Sheet\)](#)

[Filing and Maintenance \(Fact Sheet\)](#)

[E-mail as a Record –Quick Reference Guide \(Fact Sheet\)](#)

[Vital Record & Disaster Prevention, Mitigation & Recovery Basics \(Fact Sheet\)](#)

[Organize Your Information \(poster\)](#)

[Does This Look Like Your Office? \(poster\)](#)

[Moving? Consolidating? Reorganizing? \(poster\)](#)

[NARA Records Management Training](#)

### **PROVIDE RECORDS MANAGEMENT GUIDANCE**

Develop and distribute agency-specific policies, procedures and guidance for implementing records management activities, including for records created or maintained by contractors for the Federal government. Establish agency-specific recordkeeping practices. Identify parties within the agency with records management responsibilities, such as records officers or liaisons.

- Agency-specific policies:
  - [DOE Directive, O 243.1, Records Management Program \(PDF\)](#)
  - [DOE Directive, O 243.2, Vital Records\(PDF\)](#)
- EMCBC Records Management Policies and Procedures:
  - Records Management Policy (PS-243-01)
  - Identifying, Filing and Maintaining Records (IP-243-03)
  - File Plan Creation and Maintenance (IP-243-04)
  - Vital Records Identification and Protection (IP-243-02)